



Electronic Access Conference **2000 GET CONNECTED**



We Help Put America
Through School

Student Financial Assistance

Session 10

***Queries: Powerful and flexible
tools that anyone can use.***

Queries Hands-On

- Who is this session geared for?
 - Beginners
- Evaluations
- Questions
 - Feel free to ask questions throughout the session.
 - There will be time at the end for individual help.



What is a query?

- A request for information from a database
- *“A query is a set of criteria that describes a particular student population. Queries are used in functions like Print, Package, and Export to select specific groups of student records from all the records in the database. Some queries have fixed values, or you can enter different values each time you use the query.”*

EDExpress Help Text

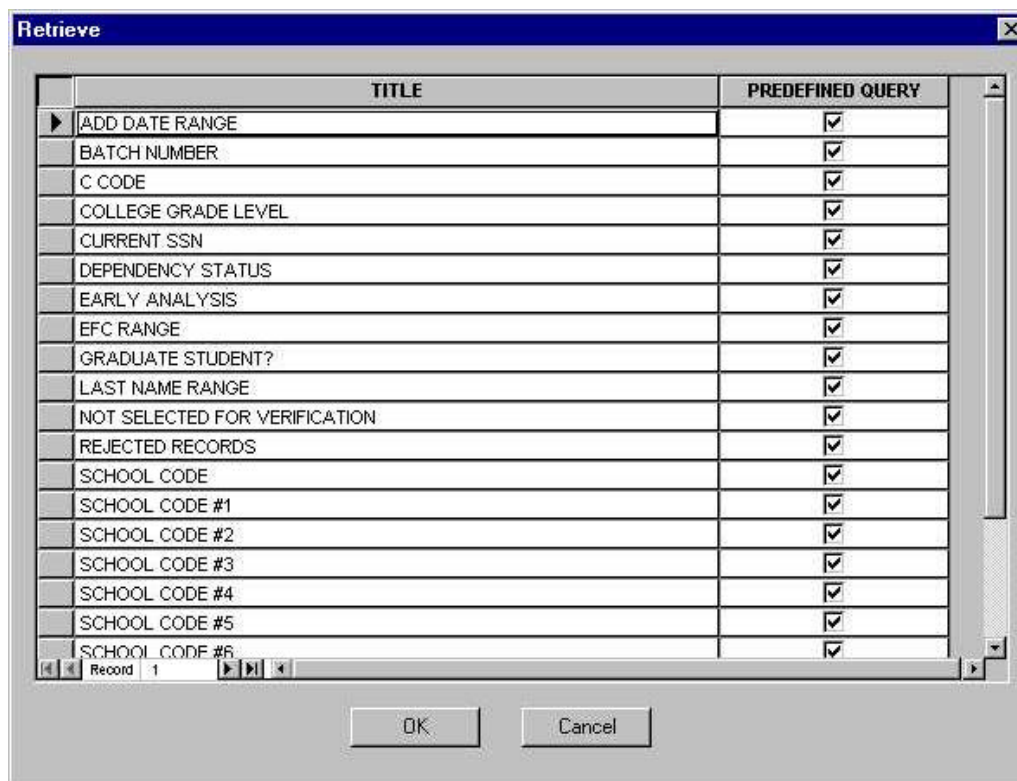


Session Overview

- Using predefined queries
- Creating your own queries
- Modifying existing queries
- The power of queries

Predefined Queries HANDS ON

■ Predefined queries in EDExpress



TITLE	PREDEFINED QUERY
ADD DATE RANGE	<input checked="" type="checkbox"/>
BATCH NUMBER	<input checked="" type="checkbox"/>
C CODE	<input checked="" type="checkbox"/>
COLLEGE GRADE LEVEL	<input checked="" type="checkbox"/>
CURRENT SSN	<input checked="" type="checkbox"/>
DEPENDENCY STATUS	<input checked="" type="checkbox"/>
EARLY ANALYSIS	<input checked="" type="checkbox"/>
EFC RANGE	<input checked="" type="checkbox"/>
GRADUATE STUDENT?	<input checked="" type="checkbox"/>
LAST NAME RANGE	<input checked="" type="checkbox"/>
NOT SELECTED FOR VERIFICATION	<input checked="" type="checkbox"/>
REJECTED RECORDS	<input checked="" type="checkbox"/>
SCHOOL CODE	<input checked="" type="checkbox"/>
SCHOOL CODE #1	<input checked="" type="checkbox"/>
SCHOOL CODE #2	<input checked="" type="checkbox"/>
SCHOOL CODE #3	<input checked="" type="checkbox"/>
SCHOOL CODE #4	<input checked="" type="checkbox"/>
SCHOOL CODE #5	<input checked="" type="checkbox"/>
SCHOOL CODE #6	<input checked="" type="checkbox"/>

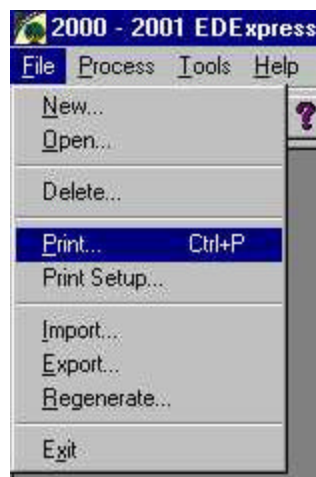
Record 1

OK Cancel

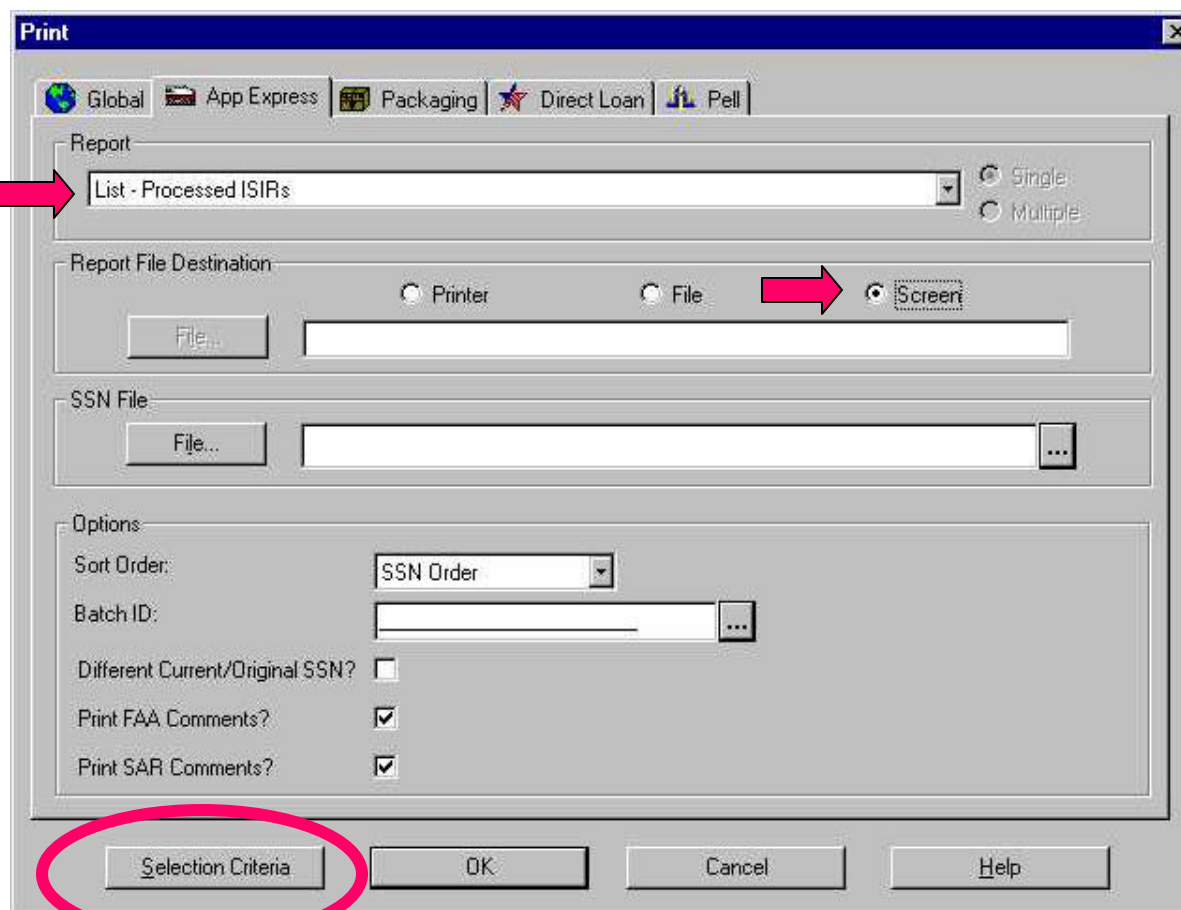


Predefined Queries HANDS ON

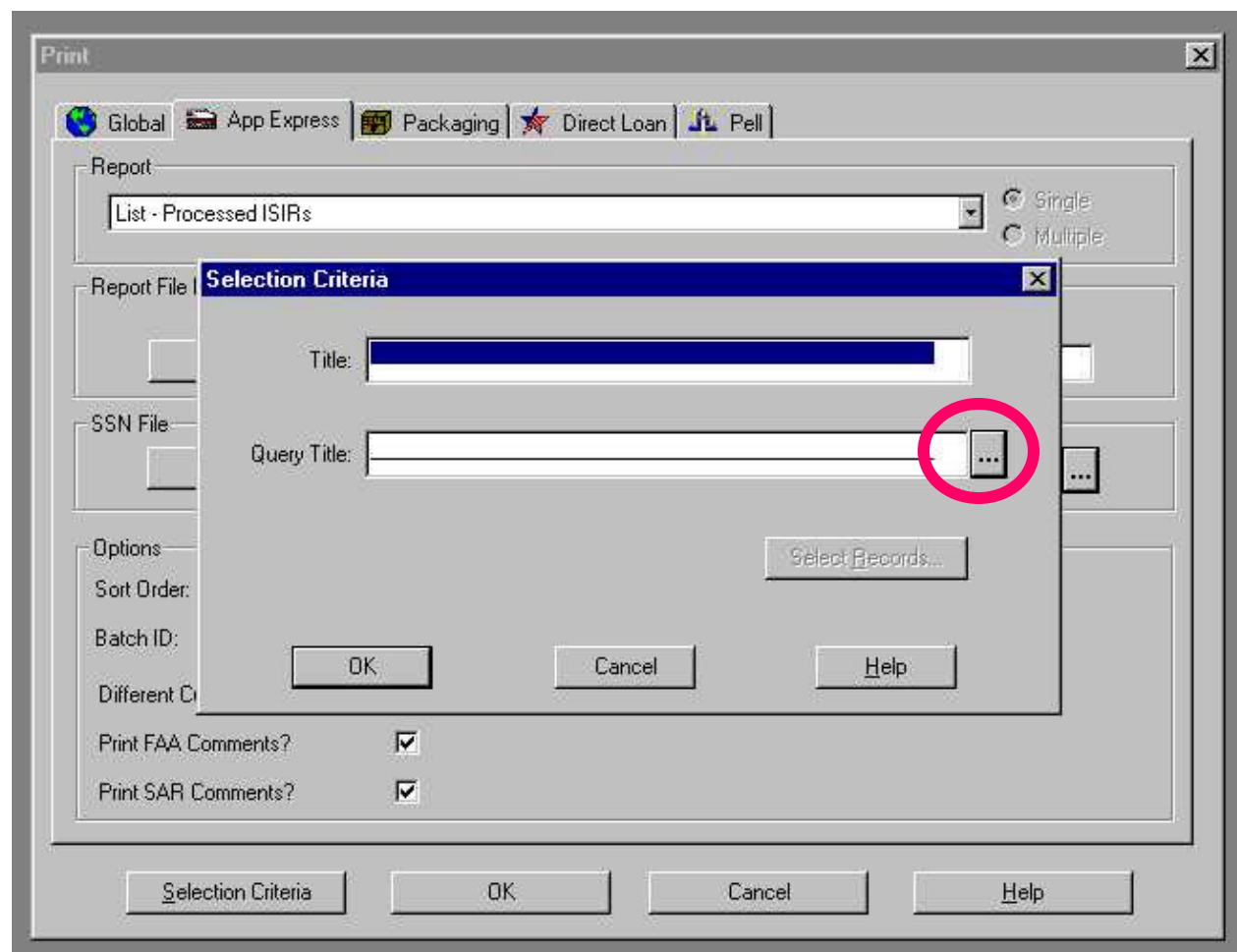
- Printing List-Processed ISIRs using predefined query
 - File|Print



- Select report type “List-Processed ISIRs”
- Select destination “Screen”
- Click on the Selection Criteria button



– Click on the ellipsis button





– Choose the desired query

Query Grid

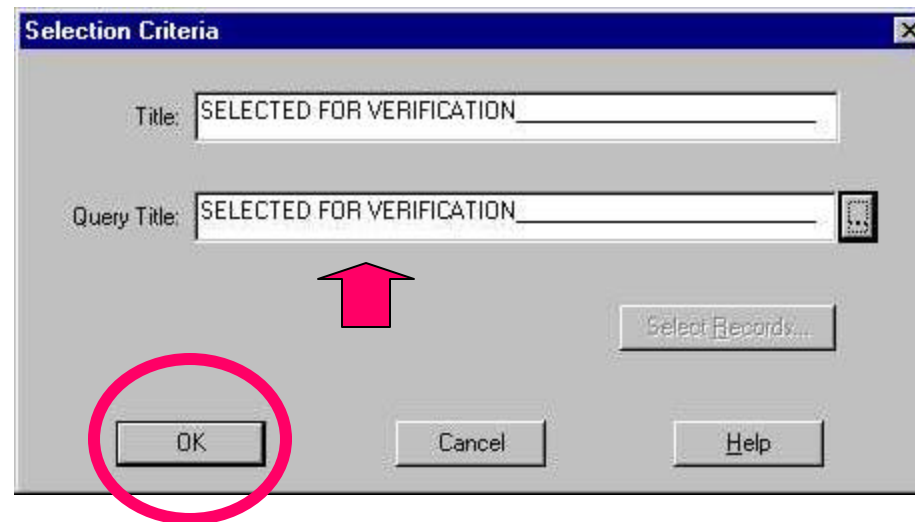
	TITLE	PARAMETER QUERY	PE
<input type="checkbox"/>	DEPENDENCY STATUS	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	EARLY ANALYSIS	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	EFC RANGE	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	GRADUATE STUDENT?	<input type="checkbox"/>	
<input type="checkbox"/>	LAST NAME RANGE	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	NOT SELECTED FOR VERIFICATION	<input type="checkbox"/>	
<input type="checkbox"/>	REJECTED RECORDS	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE #1	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE #2	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE #3	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE #4	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE #5	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SCHOOL CODE #6	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	SELECTED FOR VERIFICATION	<input type="checkbox"/>	
<input type="checkbox"/>	SSN RANGE	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	TRANSACTION TYPE	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	ZIP CODE RANGE	<input checked="" type="checkbox"/>	

Record 1

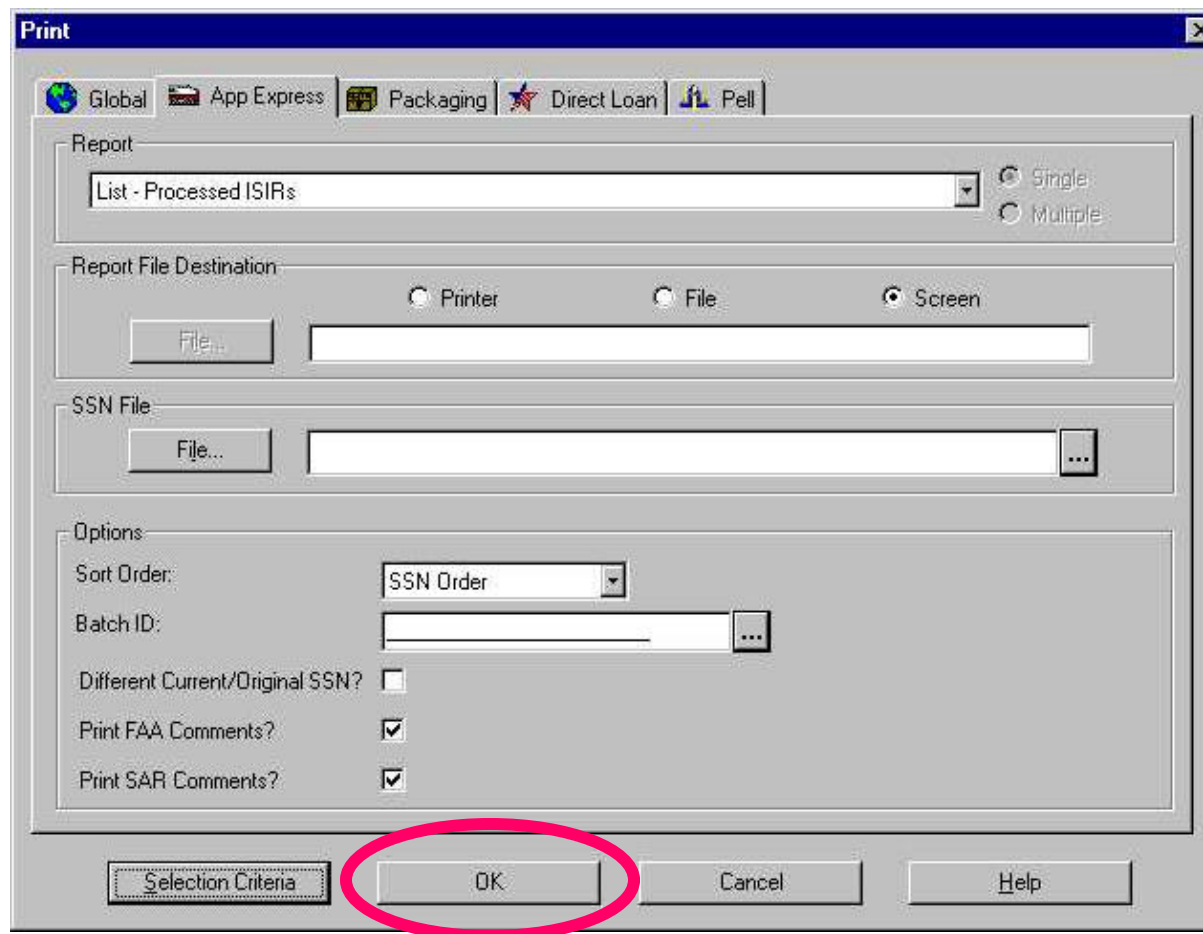
OK Cancel



- Notice that the name of the selected query fills the “Query Title” field
- Click OK



- Returns to the Print screen
- Click OK



The image shows a 'Print' dialog box with a title bar containing a close button. Below the title bar is a tabbed interface with tabs for 'Global', 'App Express', 'Packaging', 'Direct Loan', and 'Pell'. The 'Global' tab is active. The dialog is divided into several sections: 'Report' with a dropdown menu set to 'List - Processed ISIRs' and radio buttons for 'Single' and 'Multiple'; 'Report File Destination' with radio buttons for 'Printer', 'File', and 'Screen' (selected), and a 'File...' button followed by a text field; 'SSN File' with a 'File...' button followed by a text field and an ellipsis button; and 'Options' with a 'Sort Order' dropdown set to 'SSN Order', a 'Batch ID' text field with an ellipsis button, and three checkboxes: 'Different Current/Original SSN?' (unchecked), 'Print FAA Comments?' (checked), and 'Print SAR Comments?' (checked). At the bottom are four buttons: 'Selection Criteria', 'OK' (circled in red), 'Cancel', and 'Help'.





2000 - 2001 EDEExpress for Windows - [C:\TEMP\ART101.tmp]

Print... Next Page Prev Page Two Page Zoom In Zoom Out Close

Report Date: 11/06/2000 U.S. DEPARTMENT OF EDUCATION PAGE: 1
Report Time: 12:03:51 EDEXPRESS - 2000-2001
PROCESSED RECORDS LIST
SELECTED FOR VERIFICATION
THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

LAST NAME	FIRST NAME	MI	SOCIAL SECURITY NO	TRANS #	PROCESSED DATE	TRANS TYPE	EFC	VER
BAYLER	ROSS	M	076-28-9824	01	03/28/2000	1	1,705	Y
COMMENT CODES: 006,158,037,053,171								
TOMERIUS	THADDIUS		233-01-0022	01	03/28/2000	0	0	Y
COMMENT CODES: 006,149,053,118,021,171								
DRACULA	COUNT	P	233-01-0023	01	03/28/2000	0	0	Y
COMMENT CODES: 006,149,053,118,021,171								
O'MALLEY	D93456	Q	236-01-0002	01	03/28/2000	1	0	Y
COMMENT CODES: 006,149,053,117,118,051,170								
THIS LONELY	ALONE		236-01-0027	01	03/28/2000	1	0	Y
COMMENT CODES: 006,149,053,117,118,147,016,152,130,051,170								
I DIDN'T KNOW	MARTY		236-01-0028	01	03/28/2000	1	452	Y
COMMENT CODES: 006,149,053,117,118,051,170								
HIGHTY	ISIS	M	236-01-0029	01	03/28/2000	1	0	Y
COMMENT CODES: 006,149,053,117,118,171								
FLITE	CLOUD	T	236-01-0046	01	03/28/2000	1	0	Y
COMMENT CODES: 006,149,053,117,118,051,170								

Page 1 ID:\EAC DATABASE\exores01.mdb NUM

Start Inbox - Microsoft Outlook Microsoft PowerPoint - [...] 2000 - 2001 EDEx... untitled - Paint Microsoft Photo Editor 12:04 PM

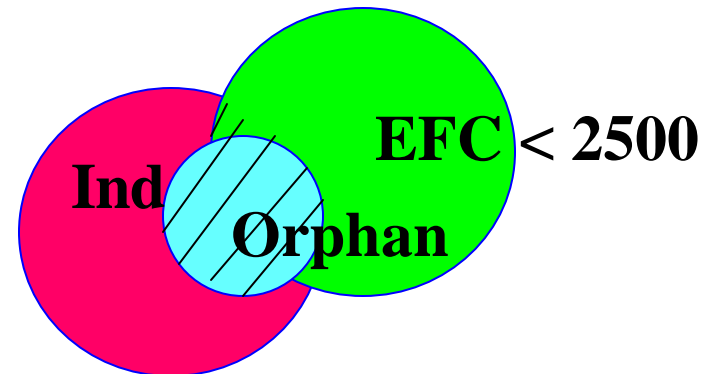


Creating your own query...

- Step 1: Decide what you want to query

BE SPECIFIC

(Independent and EFC < 2500)
or (is Orphan)



Basic Query Rules

- Queries process left to right, AND before OR
- Parenthesis change the order of precedence
 $(1+3) \div 2 = 2$ $1 + (3 \div 2) = 2.5$
- Difference between AND and OR



Creating a Query HANDS ON

- Query to find Auto Zero EFC students





Query

Global App Express Packaging Direct Loan Pell

Title:
AUTOMATIC ZERO EFC

Field: AUTOMATIC ZERO EFC Operator: = Value: Y ☐ Prompt at Execution

Criteria:
[AUTOMATIC ZERO EFC = "Y"]

Add Left Add Right Remove Left Remove Right

24 of 24

Add Delete Save Retrieve...

OK Cancel Help



Creating a Query HANDS ON

- Query to find Auto Zero EFC students

- Query to find students who are
 - Independent AND
 - EFC < 2500 AND
 - Comment Code 053 (left “Drug Eligibility Question” blank)





Query

Global App Express Packaging Direct Loan Pell

Title:
INDEPENDENT WITH EFC UNDER 2500 WITH COMMENT 053__

Field: COMMENT CODES Operator: LIKE Value: 053 ☐ Prompt at Execution

Append Remove Change And Or Value Help

Criteria:

(DEPENDENCY STATUS = "I") AND	Add Left (
(EFC < 2500) AND	Add Right)
(COMMENT CODES LIKE "053")	Remove Left (
	Remove Right)

25 of 25

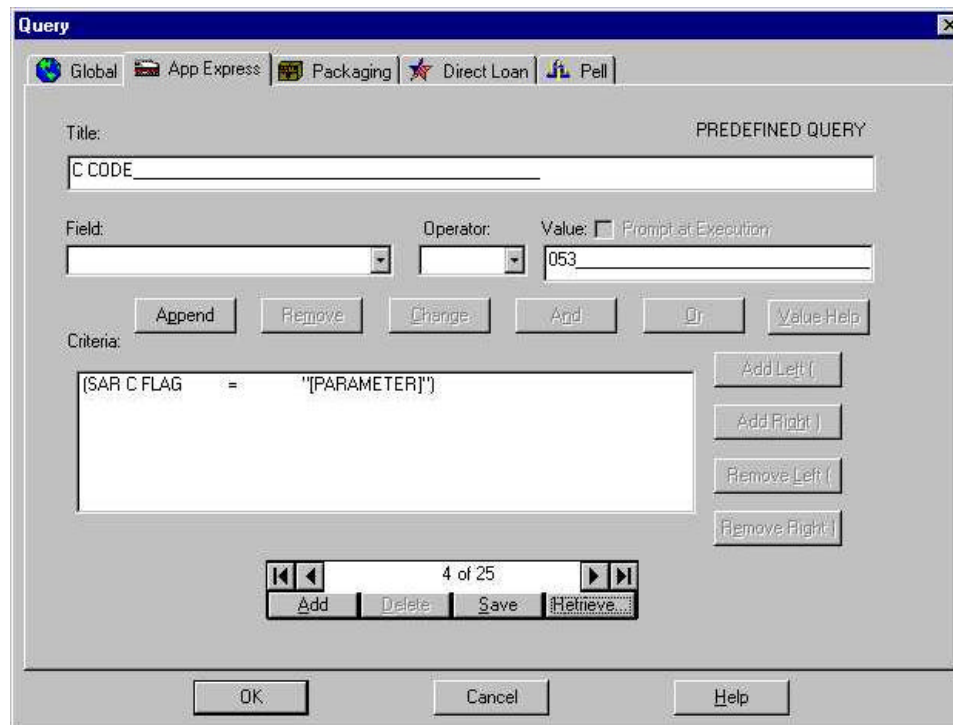
Add Delete Save Retrieve...

OK Cancel Help



Modifying Existing Query HANDS ON

- Modify C CODE query to choose students by dependency status

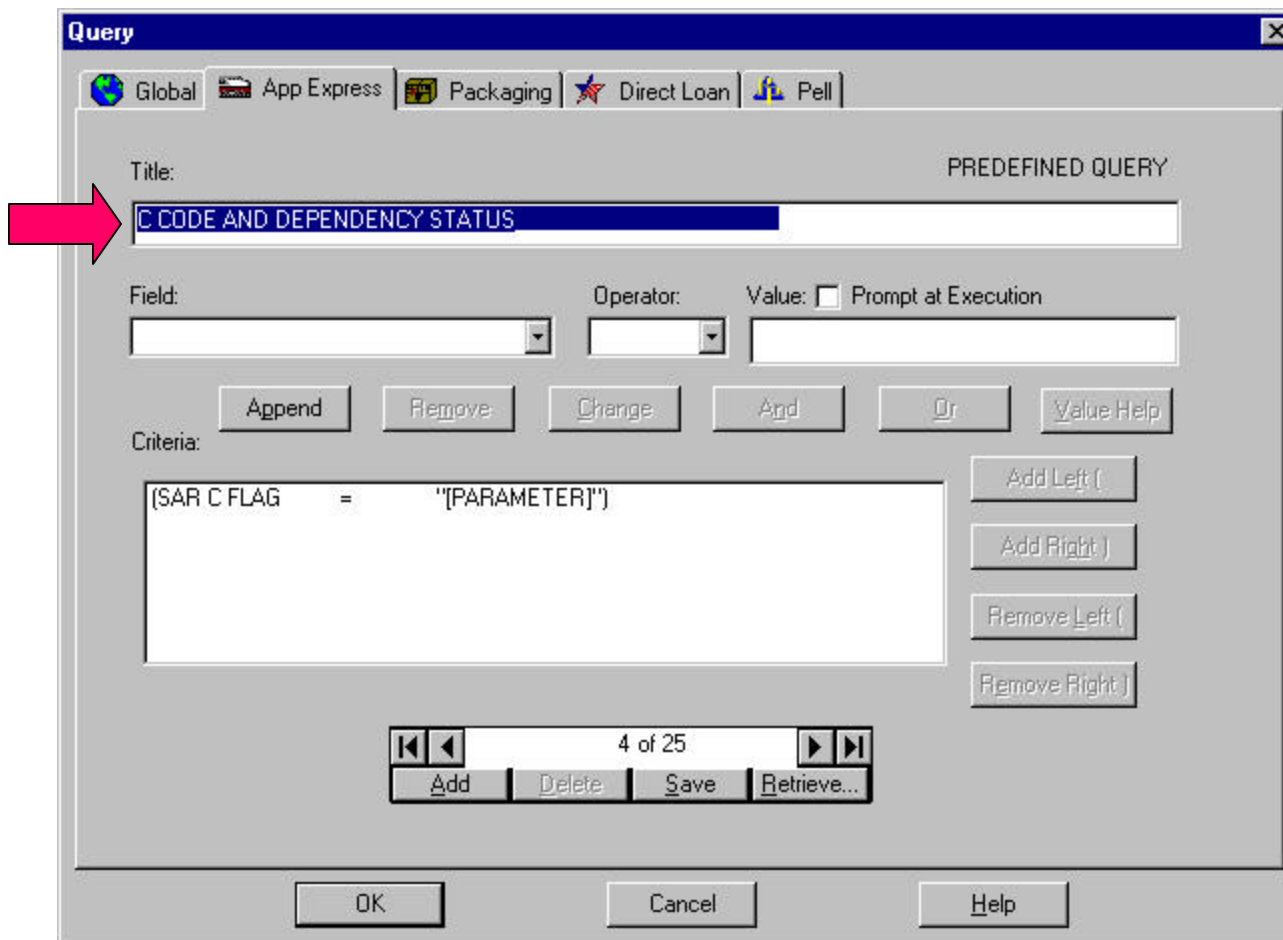


The screenshot shows a 'Query' dialog box with the following elements:

- Title:** C CODE
- Field:** (Empty dropdown)
- Operator:** (Empty dropdown)
- Value:** 053
- Criteria:** [SAR C FLAG = "[PARAMETER]"]
- Buttons:** Append, Remove, Change, Add, Or, Value Help, Add Left (, Add Right), Remove Left (, Remove Right)
- Footer:** OK, Cancel, Help



– Change the title



Query

Global App Express Packaging Direct Loan Pell

Title: PREDEFINED QUERY

C CODE AND DEPENDENCY STATUS

Field: Operator: Value: ☐ Prompt at Execution

Append Remove Change Add Or Value Help

Criteria:

(SAR C FLAG = "[PARAMETER]")

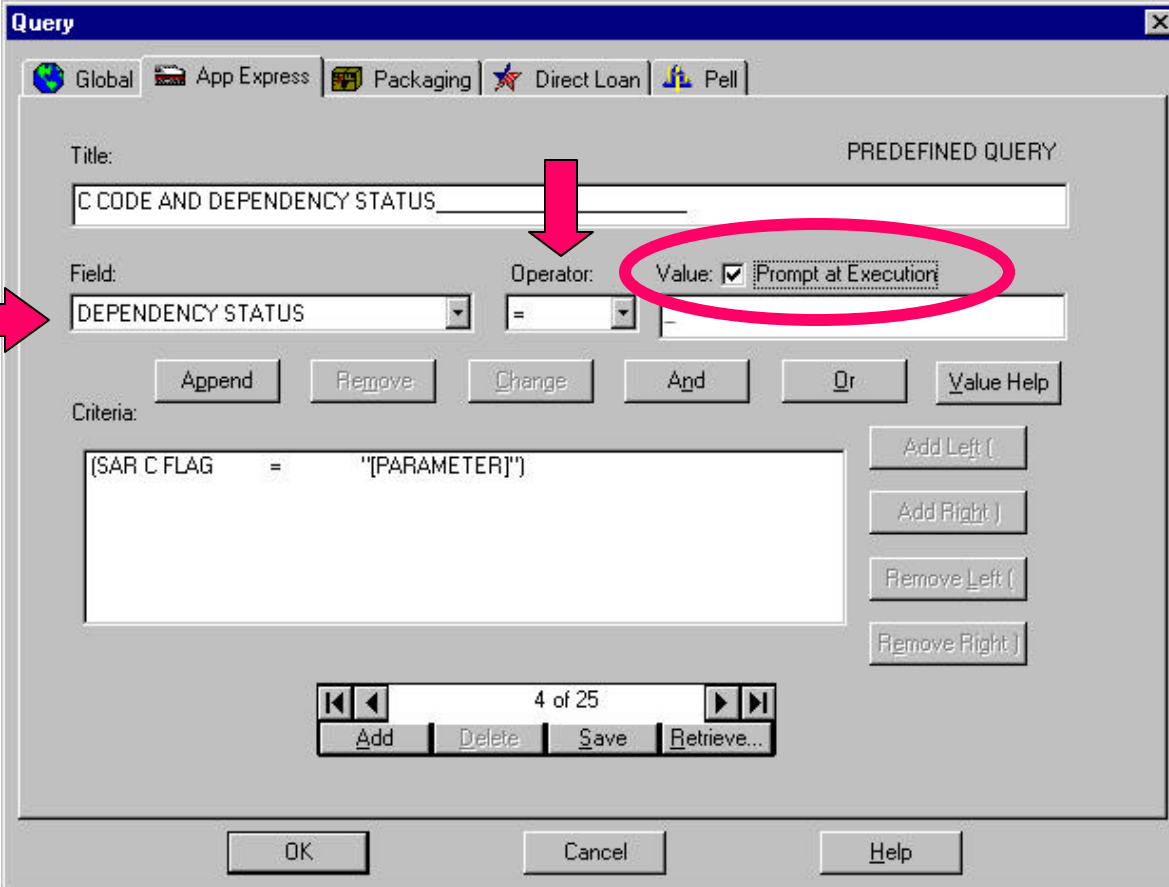
Add Left (Add Right) Remove Left (Remove Right)

4 of 25

Add Delete Save Retrieve...

OK Cancel Help





- Choose “Field” DEPENDENCY STATUS
- Set “Operator” to =
- Check “Prompt at Execution”



Query

Global App Express Packaging Direct Loan Pell

Title:
C CODE AND DEPENDENCY STATUS

Field: Operator: Value: ☐ Prompt at Execution

Append Remove Change Add Or Value Help

Criteria:

(SAR C FLAG = "[PARAMETER]") AND
(DEPENDENCY STATUS = "[PARAMETER]")

Add Left (Add Right (Remove Left (Remove Right (

26 of 26

Add Delete Save Retrieve...

OK Cancel Help





Print

Parameter Query Entry

QUERY TITLE: C CODE AND DEPENDENCY STATUS

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
SAR C FLAG	=	Y	
DEPENDENCY STATUS	=		

D
I
X
Y

OK Cancel Help Value Help View Query

Selection Criteria OK Cancel Help



Modifying Existing Query HANDS ON

- Modify C FLAG query to choose students by dependency status
- You can also modify user-defined queries



The Power of Using Queries

- Printing Reports
- Multiple Entry

Global Multiple Entry - Field/Records Selection

Default:

#	Select	Field	Value
1	<input type="checkbox"/>	Pell Verification Status	
2	<input type="checkbox"/>	Loan Entrance Interview Completed?	<input type="checkbox"/>
3	<input type="checkbox"/>	Transaction Paid On	
4	<input type="checkbox"/>	Document Code	
5	<input type="checkbox"/>	Document Status	
6	<input type="checkbox"/>	Document Received Date	
7	<input type="checkbox"/>	User Field	
8	<input type="checkbox"/>	User Value	
9	<input type="checkbox"/>	Institution Use	

SSN File

File...

Report Destination

☒ Printer ☐ File ☐ Screen

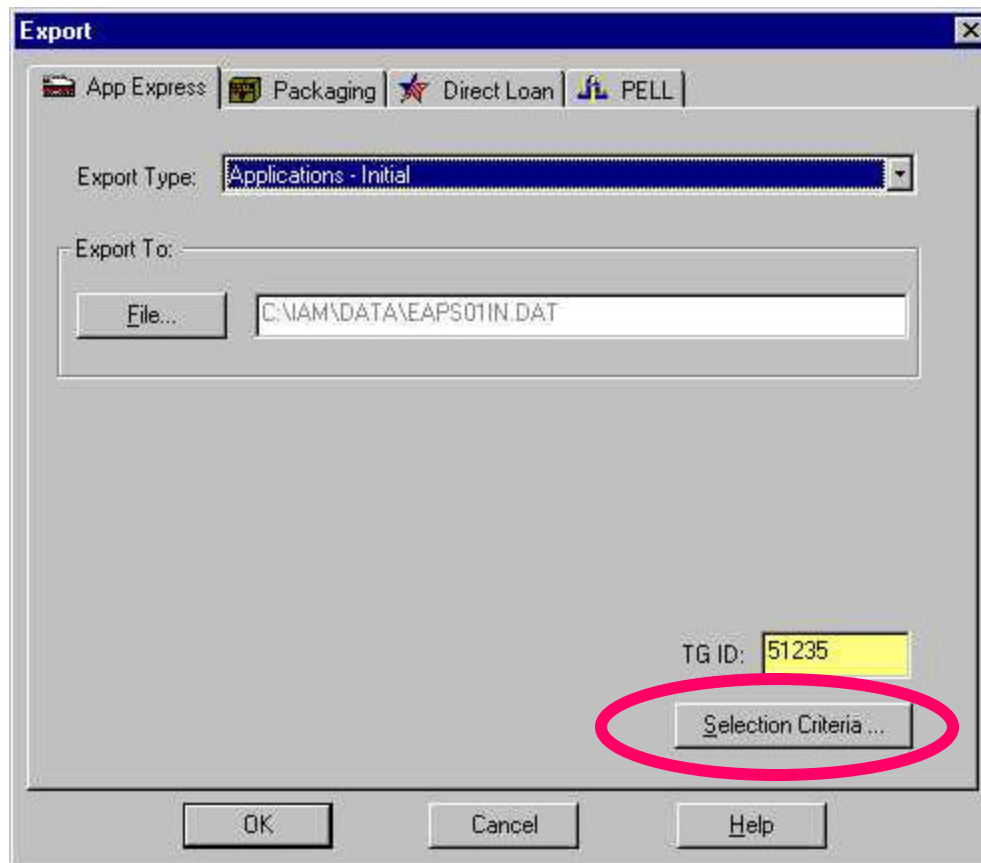
File...

OK Cancel Help **Selection Criteria**



The Power of Using Queries

- Printing Reports
- Multiple Entry
- Exporting EAPS and CORR



The Power of Using Queries

- Printing Reports
- Multiple Entry
- Exporting EAPS and CORR
- User Database fields
- Queries in combination with File Formats





File Formats

App Express | Packaging | Direct Loan | Pell

Format Code ☐

Format Description

	Select	Field Description	Table/System
1	<input type="checkbox"/>	# OF MONTHS VEAP RECEIVED	E
2	<input type="checkbox"/>	ADJUSTED AVAILABLE INCOME	E
3	<input type="checkbox"/>	AGE OF OLDER PARENT	E
4	<input type="checkbox"/>	ALIEN REGISTRATION #	E
5	<input type="checkbox"/>	ALLOWANCES AGAINST TOTAL INCOME	E
6	<input type="checkbox"/>	APPLICATION RECEIPT DATE	E
7	<input type="checkbox"/>	APPLICATION RECEIPT CORRECTION	E

Select Select All Deselect All Resequence

NEW RECORD

Add Delete Save Retrieve...

OK Cancel Help





Export

App Express | Packaging | Direct Loan | PELL

Export Type: External ISIR

Export To:

File... C:\IAM\DATA\DEFAULTEXPORTS.DAT

Select Delimiter: Fixed Length

- Fixed Length
- Tab Delimited
- Comma Delimited
- Custom Delimiter

Format Code: — ...

Selection Criteria ...

OK Cancel Help





Trankey	Last Name	First Name	Father's Educational Level	Mother's Educational Level
001010001FU01	FULLLASTNAMETEST	JANE	2	3
002472030O'01	O'TOOLE	JOHN	2	3
031289426NE01	NELSON	CAMERON	2	2
067333168WA01	WASHINGTON	DENZEL	3	3
069987246BA01	BARAKA	AMIRI		
075362152PO01	POWELL	LAURIE	2	3
076229870JA01	JACKSON	CANDY	2	2
076289824BA01	BAYLER	ROSS	3	3
098243166SM01	SMITH	LUCRETIA	4	3
126753122WO01	WONDERFUL	VERY	2	2
214223179YO01	Yوبا	MALIK	4	3
233010010GE01	GETTY	J		1
233010017HI01	HIAWATHA	BARNEY		1
233010018PI01	PICCARD	JEAN LUC		1
233010019LO01	LOWENSTEIN	JOHN		1
233010020KI01	KIRK	JAMES		1
233010021GA01	GATES	WILLIAM		1
233010022TO01	TOMERIUS	THADDIUS		1
233010023DR01	DRACULA	COUNT		1
236010002O'01	O'MALLEY	D93456		1
236010003B.01	B.DOT	A.-		
236010005D'01	D'3876543210	FULLFIRST	2	2
236010010LI01	LIGHTING	ADDISON		



Session Review

- Using predefined queries
- Creating your own queries
- Modifying existing queries
- The power of queries

Further Assistance

We appreciate your feedback and comments.

CPS Customer Service

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Email: <cps@ncs.com>

TDD/TTY: (800) 511-5806

SFATECH

<http://www.ed.gov/offices/OSFAP/sfatech/index.html>



Questions?

- Individual assistance available for remainder of this session.
- Visit the PC lab for more individual assistance.



Electronic Access Conference
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We Help Put America
Through School